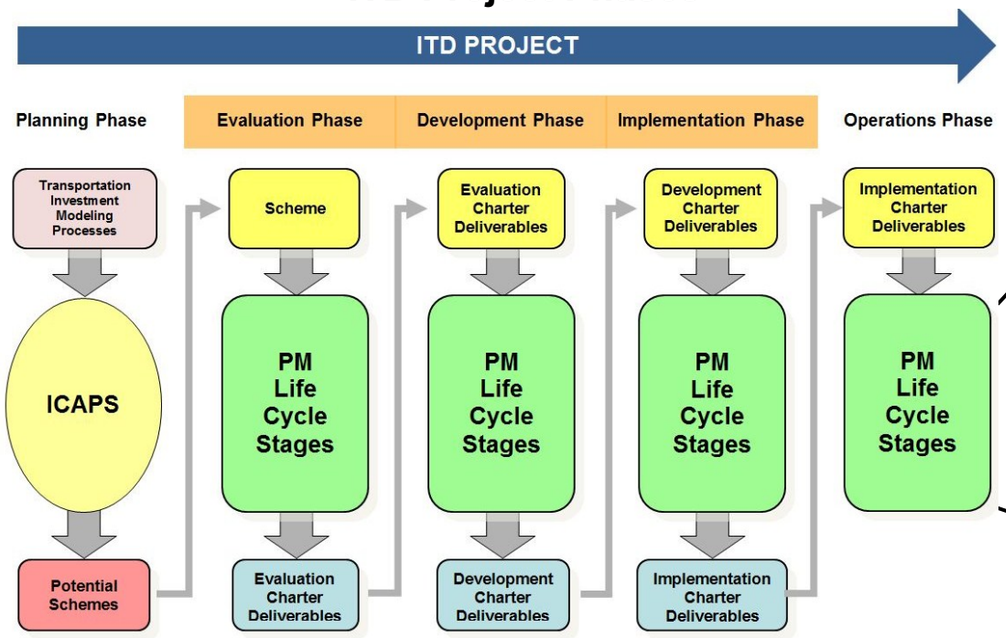
ITD Project Management Academy Reference Card

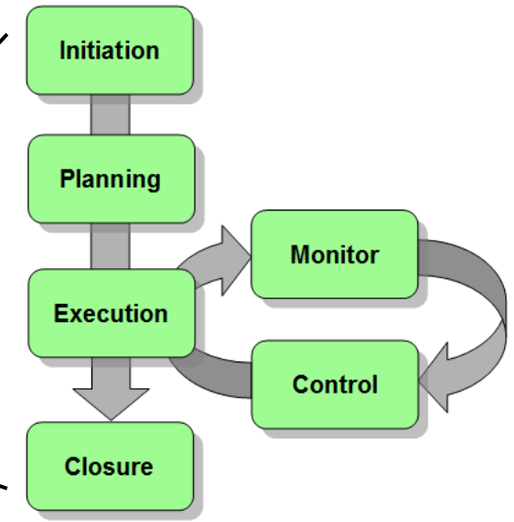
Project Management Academy

Updated April 30, 2013

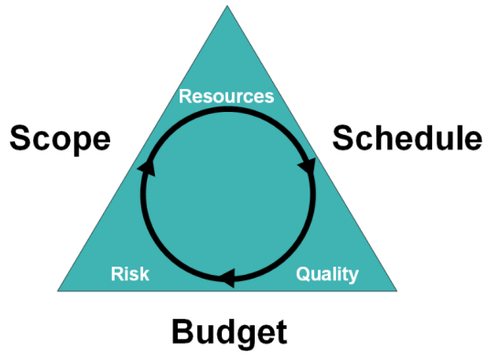
ITD Project Phases



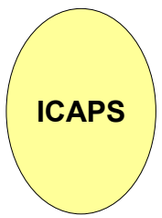
Project Management Life Cycle Stages



The Triple Constraint



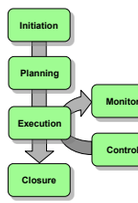
Planning Phase



Investment
Corridor
Analysis
Planning
System

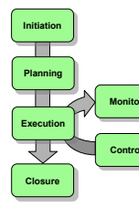
ICAPS is ITD's framework for *performance-based planning* and investment analysis.

Evaluation Phase



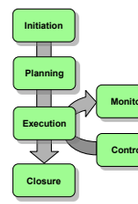
- Define Evaluation Roles & Responsibilities
- Data Gathering
- Determine Selection Criteria
- Project Prioritization / Ranking
- Develop / Approve Project Charter
- ITIP Documentation
- Approve STIP
- Proceed with Project

Development Phase



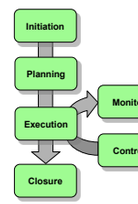
- Review / Update Project Charter
- Define Development Roles & Responsibilities
- Development Kick-Off Meeting
- Development WBS
- Project Management Plans
- Development Activities
- Change Management / QC-QA
- Contract Documents / Award
- Lessons Learned
- Development Archive

Implementation Phase



- Review / Update Project Charter
- Define Implementation Roles & Responsibilities
- Implementation Kick-Off Meeting
- Implementation WBS
- Project Management Plans
- Implementation Activities
- Change Management / QC-QA
- Substantial Completion
- Lessons Learned
- Implementation Archive

Operations Phase



- Define Operations Roles & Responsibilities
- Project Management Plans
- Operations Activities
- Change Management / QC-QA
- Lessons Learned

Project Charter Workflow Diagram

***2PM**—Planning & Program Management*
***DOH**—Department of Highways*
***EPT**—Enterprise Project Type*
***PDP**—Project Detail Page*
***PWA**—Project Web Application*
***QSA**—QuantumPM Schedule Auditor*
***TMM**—True Minimum Milestone*

Project Management Academy

1 Evaluation Phase

Project Manager

1. Creates and publishes project from Microsoft Project Professional based on DOH master template.
2. Updates project EPT.
3. Fills out Evaluation Phase information, including stakeholder list in PWA workspace.
4. Defines high-level schedule & runs QSA in Microsoft Project Professional.
5. Enters Temporary Key # and date obtained in charter PDP.
6. Submits charter to 2PM for approval.

2PM

7. Validates Temporary Key #.
8. Runs compliance checks using QSA.
9. Approves charter.
10. Submits charter to Project Owner for approval.

Project Owner

11. Reviews Evaluation Phase charter.
12. Following ITIP approval by the Idaho Transportation Board, approves charter.
13. Submits charter to Project Sponsor for approval.

Project Sponsor

14. Reviews Evaluation Phase charter.
15. Approves charter.

- System takes a snapshot of all current charter information.
- System baselines obligated funding amount from Project Tracking.
- Office of Transportation Investment (OTI) issues Key # based on Temporary Key #, following Board approval.
- System pulls funding information onto the Fudning & Cost Summary PDP.
- System captures TMM level data (baselines and actual)
- Phase transitions to “Development.”

2 Development Phase

Project Manager

1. Reviews and updates charter for Development Phase.
2. Refines schedule and runs QSA.
3. (Optional) Runs multiple custom reports reflected in PDPs to use during negotiations with Resource Manager to determine resources.
4. Publishes updated schedule.
5. When schedule is completed, submits charter to Project Owner for baseline approval.

Project Owner

6. Reviews Development Phase charter and schedule.
7. Reviews Schedule Approval Report.
8. Approves charter.
9. Submits charter to Project Sponsor for approval.

Project Sponsor

10. Reviews Development Phase charter and schedule.
11. Reviews Schedule Approval Report.
12. Approves or suggests changes.
13. If approved, notifies Project Manager to baseline schedule.

Project Manager

14. Baselines the schedule.
15. Manages project.
16. Enters PS&E package Delivered Date and Contract Award Date.
17. Submits charter to Project Owner for approval.

Project Owner

18. Reviews Development Phase charter.
19. Approves charter.
20. Submits charter to Project Sponsor for approval.

Project Sponsor

21. Reviews Development Phase charter.
22. Approves charter.

- System takes a snapshot of all current charter information.
- System pulls funding information onto the Funding & Cost Summary PDP.
- System captures TMM level data (baselines and actual).
- Phase transitions to “Implementation.”

3 Implementation Phase

Project Manager

1. Reviews and updates charter for Implementation Phase.
2. Refines schedule based on contractor’s schedule and runs QSA.
3. (Optional) Runs multiple custom reports reflected in PDPs.
4. When schedule is completed, submits charter to Project Owner for approval.

Project Owner

5. Reviews Implementation Phase charter and schedule.
6. Reviews Schedule Approval Report.
7. Approves charter.
8. Submits charter to Project Sponsor for approval.

Project Sponsor

9. Reviews Implementation Phase charter and schedule.
10. Reviews Schedule Approval Report.
11. Approves or suggests changes.
12. If approved, notifies the Project Manager to baseline schedule.

Project Manager

13. Baselines schedule.
14. Manages project.
15. Enters Final Voucher Issues,
16. Submits charter to Project Owner for approval.

Project Owner

17. Reviews Implementation Phase charter.
18. Approves charter.
19. Submits charter to Project Sponsor for approval.

Project Sponsor

20. Reviews Implementation Phase charter.
21. Approves charter.

- System takes a snapshot of all current charter information.
- System pulls funding information onto the Funding & Cost Summary PDP.
- System captures TMM level data (baselines and actual).
- Phase transitions to “Closeout.”